



EMPLOYEE BENEFITS CONFERENCE

St. Pete Beach, Florida | January 23–26, 2022

Sunday, January 23

REGISTRATION

12:00 p.m.–5:00 p.m. | Grand Palm Colonnade

ERTS UPDATE

1:30 p.m.–2:40 p.m. | Tarpon Key / Sawyer Key

[Brian Threadgold](#), Senior Executive Assistant to the International Secretary-Treasurer, IBEW

[Ryan O'Leary](#), Director, IBEW Pension and Reciprocity Department

[Hugh Roberts](#), Vice President, Professional Services, Allen Bates Technologies

BREAK

2:40 p.m.–3:00 p.m.

FUND ADMINISTRATORS' MEETING

3:00 p.m.–4:30 p.m. | Tarpon Key / Sawyer Key

WELCOME RECEPTION

Sponsored by National Real Estate Advisors

5:00 p.m.–7:00 p.m. | Breck Deck North

Monday, January 24

REGISTRATION

7:00 a.m.–8:30 a.m. | Grand Palm Colonnade

BREAKFAST

Sponsored by GCM Grosvenor, LSV Asset Management, and National Investment Services, Inc.

7:00 a.m.–8:30 a.m. | Garden Courtyard (*The Pavilion in case of inclement weather*)

PRE-CONFERENCE WORKSHOPS

8:30 a.m.–9:20 a.m.

HIPAA Best Practices | Tarpon Key

[Katie Burch](#), Attorney, Potts-Dupre, Hawkins & Kramer

Pension Benefit Fund Tutorial | Sawyer Key

[Ryan O'Leary](#)

Infrastructure | Long Key

[Monte Tarbox](#), Executive Director, NEBF Investments

BREAK

9:20 a.m.–9:30 a.m.

PRE-CONFERENCE WORKSHOPS

9:30 a.m.–10:20 a.m. | Workshops repeated in same rooms

BREAK

10:20 a.m.–10:40 a.m.

PRE-CONFERENCE WORKSHOPS

10:40 a.m.–11:30 a.m. | Workshops repeated in same rooms

LUNCH

11:30 a.m.–1:00 p.m. | Garden Courtyard (*The Pavilion in case of inclement weather*)

PRE-CONFERENCE WORKSHOPS

1:00 p.m.–1:50 p.m.

ERTS Tutorial for Business Managers and Local Union Officers | Tarpon Key

[Hugh Roberts](#)

Protecting Trustees and Plan Assets | Sawyer Key

[Tina Fletcher](#), President, Ullico Casualty Group

[Stephanie Whalen](#), President, The Union Labor Life Insurance Company

Segal Marco Health Care Trends | Long Key

[Edward Kaplan](#), Senior Vice President, National Health Practice Leader, Segal

BREAK

1:50 p.m.–2:00 p.m.

Monday, January 24 (continued)

PRE-CONFERENCE WORKSHOPS

2:00 p.m.–2:50 p.m. | Workshops repeated in same rooms

BREAK

2:50 p.m.–3:00 p.m.

PRE-CONFERENCE WORKSHOPS

3:00 p.m.–4:00 p.m. | Workshops repeated in same rooms

EVENING RECEPTION

*Sponsored by Lazard Asset Management, Loomis Sayles, and Lord Abbett
Cigars sponsored by Cowden Associates, Inc.*

6:00 p.m.–8:00 p.m. | Breck Deck North

Tuesday, January 25

REGISTRATION

7:00 a.m.–8:30 a.m. | Grand Palm Colonnade

BREAKFAST

Sponsored by ASB Capital Management, LLC and Segal Marco Advisors

7:00 a.m.–8:30 a.m. | Garden Courtyard (*The Pavilion in case of inclement weather*)

GENERAL SESSION

8:30 a.m.–12:00 p.m. | Island Ballroom

Welcome to St. Pete Beach, Florida

[Randall King](#), Business Manager, IBEW Local Union 915

[Richard Padilla](#), Executive Manager, Florida West Coast & Central Chapter, NECA

Welcome and Introductions

[Lonnie R. Stephenson](#), International President, IBEW

[David Long](#), Chief Executive Officer, NECA

[Kenneth W. Cooper](#), International Secretary-Treasurer, IBEW

[Kirk Davis](#), President, NECA

Foster & Foster Health & Welfare

[Travis Smith](#), President, Health & Welfare, Foster & Foster

Break

Legal Issues and Updates

[Katie Burch](#)

[Jennifer Hawkins](#), Attorney, Potts-Dupre, Hawkins & Kramer

[Shane Kramer](#), Attorney, Potts-Dupre, Hawkins & Kramer

Real Estate Discussion

[Jeff Kanne](#), President and CEO, National Real Estate Advisors

LUNCH

12:00 p.m.–1:30 p.m. | Garden Courtyard (*The Pavilion in case of inclement weather*)

GENERAL SESSION

1:30 p.m.–5:00 p.m. | Island Ballroom

Eberts & Harrison Cybersecurity

[Christian Phillips](#), President, Eberts & Harrison

Electrical Workers Sav-Rx Prescription Coalition Update

[Christy Piti](#), CEO, Sav-Rx

Corporate Governance and Proxy

[Sue Crotty](#), Senior Vice President, Segal Marco Advisors

Break

Tuesday, January 25 (continued)

Lazard Asset Management, Inflation

[Ronald Temple](#), Co-Head of Multi-Asset and Head of US Equity, Lazard Asset Management

AFL-CIO Building Investment Trust

[Randy Kinder](#), President, AFL-CIO Building Investment Trust

NEBF/NEAP/FMCP Update

[Larry Bradley](#), Executive Secretary-Treasurer, NEBF

Reminders

[Ryan O'Leary](#)

EVENING RECEPTION

*Sponsored by **BNY Mellon, Invesco, and Ullico***

5:30 p.m.–7:30 p.m. | Breck Deck North



Wednesday, January 26

BREAKFAST

Sponsored by Prudential Retirement

7:00 a.m.–8:30 a.m. | Garden Courtyard (*The Pavilion in case of inclement weather*)

GENERAL SESSION

8:30 a.m.–12:00 p.m. | Island Ballroom

Ullico Update

[Ed Smith](#), President and CEO, Ullico Inc.

AFL-CIO Housing Investment Trust

[Lesylleé M. White](#), Chief Marketing Officer, AFL-CIO Housing Investment Trust

IBEW-NECA Equity Index Fund

[Hank Murphey](#), Vice President and Director, Client Services, ASB Capital Management, LLC

Break

Invesco Stable Value Fund Update

[Blair Wilson](#), Manager of Stable Value Administration, Invesco

NEBF Economic Impact Report

[Kevin McCormack](#), Managing Director, NEBF Investments

Leadership

[Larry Bradley](#)

Closing Remarks

[Ryan O’Leary](#)



Sponsors and Exhibitors

WELCOME RECEPTION

National Real Estate Advisors

MONDAY BREAKFAST

GCM Grosvenor

LSV Asset Management

National Investment Services, Inc.

MONDAY RECEPTION

Lazard Asset Management

Loomis Sayles

Lord Abbett

TUESDAY BREAKFAST

ASB Capital Management, LLC

Segal Marco Advisors

TUESDAY RECEPTION

BNY Mellon

Invesco

Ullico

WEDNESDAY BREAKFAST

Prudential Retirement

CIGARS

Cowden Associates, Inc.

Sponsors and Exhibitors *(continued)*

PLATINUM

AFL-CIO Building Investment Trust
AFL-CIO Housing Investment Trust
BeneSys
Intercontinental Real Estate Corporation
Janus Henderson Investors

RBC Global Asset Management
Robbins Geller Rudman & Dowd, LLP
Ullico
Union Insurance Group

GOLD

Alan Biller and Associates
Anthem Blue Cross and Blue Shield
Baird Advisors
BentallGreenOak's MEPT Fund
Eberts & Harrison, Inc.
Horizon Actuarial Services
IBEW Local Union 47

Invesco
Labor First
Marquette Associates
Progyny
Scarborough Alliance Group
Zenith American Solutions

SILVER

Activate by Everside Health
American Realty Advisors
Awards & T-Shirts Specialists, Inc.
Centennial Securities
Chartwell Investment Partners
Cigna
Columbia Partners Private Capital
Delta Dental
Electrical Capital Advisors
EnTrust Global
Foster & Foster, Inc.
Group Vision Service
HGK Asset Management
Humana

Included Health
John Hancock Financial Services
J.P. Morgan Asset Management
Manning & Napier
Manulife
Meyer, Unkovic & Scott, LLP
Milliman
NEBA, Inc.
Neuberger Berman
Sav-Rx
Stars and Stripes
Telligen
Union Benefit Planners

BRONZE

Amalgamated Bank
Berkshire Hathaway
Berman Tabacco
Great Lakes Advisors
Johnson Asset Management

PNC Institutional Asset Management
Stuart Portfolio Consultants
United Actuarial Services
U.S. Bank
William Blair